

XSEDE Service Provider and Campus Bridging Checklists

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Version 1.5

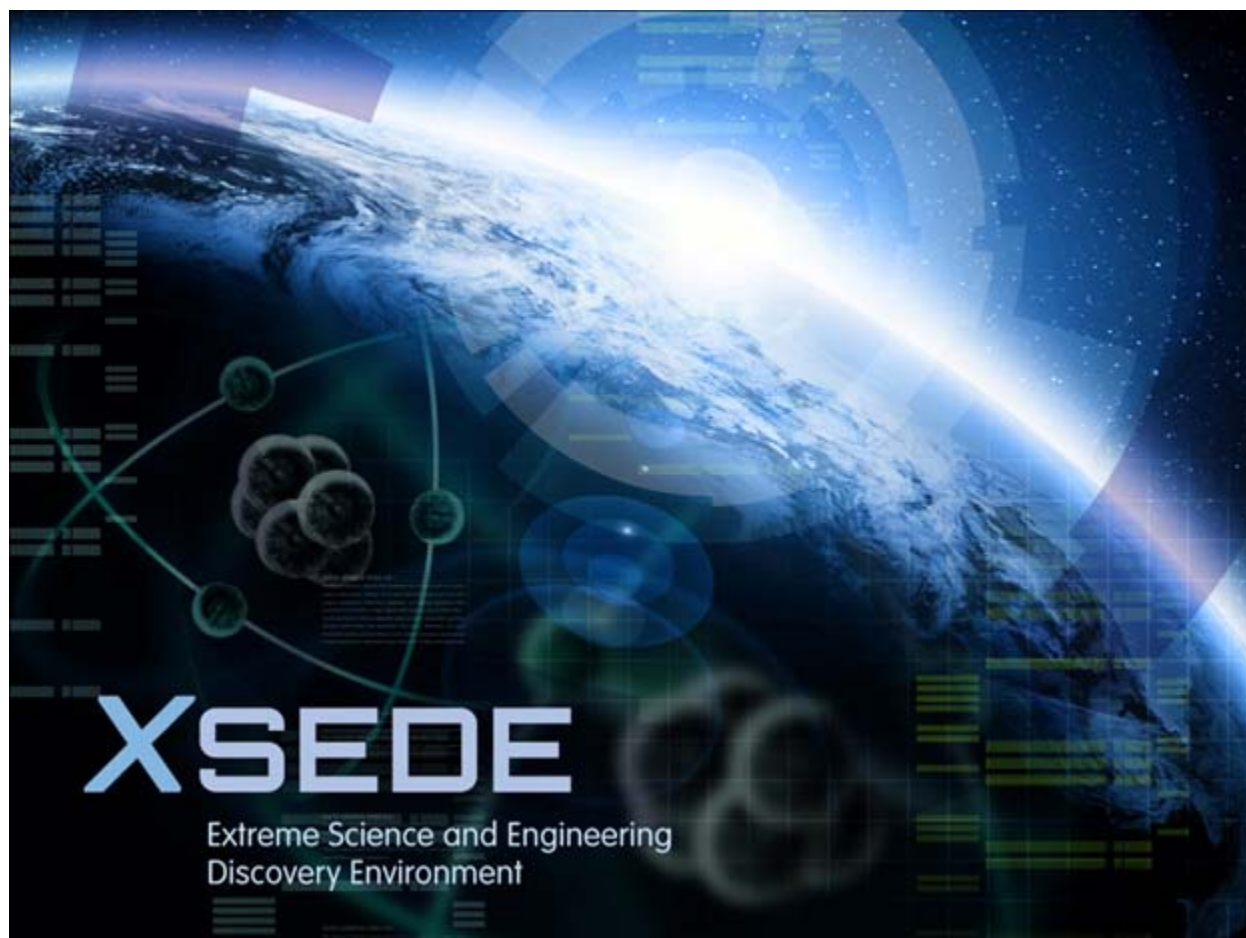


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A. Document History

| Relevant Sections | Version | Date | Changes | Author |
|--|---------|------------|--|--|
| Entire Document | 1.00 | 5/11/2012 | Initial version | VGH,TB |
| Checklist on page 2 Checklist on page 3 | 1.1 | 2/19/2013 | Removed mention of nagios, reference to contacts no longer with XSEDE and INCA contact. Contacts updated on page 3 | VGH |
| Checklist on page 2,3 | 1.2 | 2/25/2013 | After meeting with SPs I came across some items to update and be more clear about | VGH |
| Checklist tables | 1.3 | 10/8/2013 | Updated contact information in checklist tables | VGH |
| Checklist page 2 under ECSS | 1.4 | 12/10/2013 | Added detailed ECSS information needed | VGH,NWD |
| Added Exit Checklist sections | 1.5 | 1/21/2014 | Added Exit checklist information which came from SP Forum discussions | VGH editor, RLM, GDP, B.Sinkovits, B. Stock, SPForum |

B. Document Scope

The following describes the XSEDE Service Providers (SPs) and Campus Bridging (CB) checklists to be used for integration and/or deployment of a new resource in XSEDE, verify an existing resource at an SP site, to coordinate a campus bridging project, or for the exit of a resource from XSEDE.

C. Service Provider and Campus Bridging Checklists

The following describes the XSEDE Service Providers (SPs) and Campus Bridging (CB) checklists to be used for entry, annual review and exit of a new resource in XSEDE, to verify an existing resource at an SP site or to coordinate a campus bridging project. These checklists are maintained by the XSEDE Operations Software Testing and Deployment (ST&D) group. The SP and CB checklists include installation of some or all of the XSEDE Software and Services as appropriate for the resource. The separately maintained XSEDE Software and Services Table document provides a summary of the XSEDE Software and Services Baseline document [1] and provides a concise high-level overview with links to further descriptions and links to the software and installation instructions.

As there is lead time for many of the coordination, notification and starting discussions between XSEDE and the new SP staff should begin prior to one quarter before the allocation is to begin. Since the information needs to be published in the XSEDE allocations system prior to award advanced discussions should begin **at least** one quarter prior to start of allocations awards on the new system.

Note that starting an SP deployment or coordinating a campus bridging projects starts with contacting the SP coordinator in the XSEDE Operations Software Testing and Deployment group as the first step.

For any questions regarding this checklist please contact the ST&D manager, Troy Baer or the XSEDE Operations Deputy Director, Victor Hazlewood. Contact Troy Baer at tbaer@utk.edu or Victor Hazlewood at victor@utk.edu.

Locations where SP resource information is viewable and in some cases modifiable by the SP include the following:

| Item | URL |
|---|---|
| RDR | https://rdr.xsede.org |
| Portal | https://portal.xsede.org/ |
| Information Services | http://info.xsede.org |
| Allocation and usage resource for staff | https://xupapps.tacc.utexas.edu/staff_queries/ |

[1] - https://www.xsede.org/documents/10157/281380/XSEDE_SP_Software_and_Services_Baseline_v1.0.pdf

D. Service Provider and Campus Bridging Entry/Annual Checklists

| SP Level 1 and Level 2 Entry/Annual Checklist - all resource types | | |
|---|-----------------------------------|---|
| Integration Item | XSEDE Group | Contact |
| Start | | |
| Contact ST&D Coordinator to initiate SP integration project (coordinator to notify all Operations Managers) | Operations, ST&D | SP Coordinator |
| Allocations | | |
| Allocations Process Integration | User Support, Allocations | Ken Hackworth |
| POPS allocation system integration | Operations, A&AM | Amy Schuele |
| Request SP/Site Staff Allocation (if necessary) (For new resources at a new site, do not add the resource to "staff" resource until after production. If new resource is at a new site have this allocation only on the new resource. Once in production then add to "staff" resource.) | User Support, Allocations | Ken Hackworth |
| Systems Integration | | |
| XSEDEnet integration (SP L1 and SP L2) | Operations, XSEDEnet | Joe Lappa |
| XSEDE ticket system integration coordination | Operations, SysOps | Mike Pingleton |
| AMIE implementation <ul style="list-style-type: none"> • Project/account create/modify • Job accounting • Gateway end-user accounting • Storage allocation accounting | Operations, AA&M | Amy Schuele |
| Software and Services installation (See Software and Services Summary Table) | Operations, ST&D | SP Coordinator |
| Information Services Integration globus-mds-info (See Software and Services Summary Table) | Operations, ST&D and SDI | SP Coordinator Info Services Coordinator |
| Portal Integration globus-wsrf-mds (See Software and Services Summary Table) | User Support, User Info Resources | Maytal Dahan |
| Update RDR information (https://rdr.teragrid.org/rdr/) | Operations, ST&D | SP Coordinator |
| XSEDE automated production testing (INCA) | Operations | Shava Smallen |
| Other Coordination or Integration | | |
| ECSS coordination <ul style="list-style-type: none"> • Advanced notice, as possible • Identify ECSS that need staff accounts in first allocation quarter (prior to general staff account access) • Description of specialty expertise that | ECSS | Nancy Wilkins-Diehr |

| | | |
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| is expected for the new resource | | |
| <ul style="list-style-type: none"> • Discussion of how ECSS support can be handled | | |
| Identify liaison/coordinator to Campus Champions | EOT | Scott Lathrop |
| How can SPs feedback into XSEDE | | |
| <ul style="list-style-type: none"> • Develop and describe SP Use Cases • Develop and describe SP Requirements • Feedback on Software and Services | Engineering Engineering SDI | Janet Brown Janet Brown help@xsede.org (JP also) |
| Communications | | |
| User Guide development for website/portal | User Support, User Info Services | Maytal Dahan Susan Lindsey |
| Media Communications Coordination | User Support | Travis Tate |
| Operations mailing lists participation | Operations ST&D | ST&D SP Coordinator |
| <ul style="list-style-type: none"> - ops-accting@xsede.org (accounting) - ops-sp-software@xsede.org (SP SW and services) - incident-discuss@xsede.org | | |
| Develop Training | User Support, Training | Sam Moore |
| SP Forum Participation | SP Forum | SP Forum Chair |
| Final Checkout prior to production | | |
| SP Integration Testing (SP staff and XSEDE staff) | Ops, SP | ST&D SP Coordinator |
| SP Friendly User Testing | Ops, SP, and Users | ST&D SP Coordinator |
| Ticket routing testing | Operations, SysOps and SP | Mike Pingleton and SP representative |
| Add resource to “staff” resource (as necessary SP L1, L2) | Operations, A&AM | Amy Schuele |

| SP Level 3 and Campus Bridging (CB) Entry/Annual Checklist - all resource types | | |
|--|---|---|
| Integration Item | XSEDE Group | Contact |
| <i>Start</i> | | |
| Contact ST&D CB Coordinator to initiate SP Level 3 or campus bridging integration project | Operations, ST&D | ST&D CB Coordinator |
| <i>Allocations</i> | | |
| None | | |
| <i>Systems Integration</i> | | |
| XSEDE ticket system integration coordination (for SP L3) | Operations, SysOps | Mike Pingleton |
| Software and Services installation (See Software and Services Summary Table) | Operations, ST&D | ST&D CB Coordinator |
| Information Services Integration | Operations, ST&D and SDI | ST&D SP Coordinator Information Services Coordinator |
| <i>Other Coordination or Integration</i> | | |
| Identify liaison/coordinator to Campus Champions | EOT | Scott Lathrop |
| Develop and describe CB Use Case(s) | Systems Engineering | Janet Brown |
| Develop and describe CB Requirements | Systems Engineering | Janet Brown |
| Feedback on Software and Services | XSEDE ticket system or SDI | help@xsede.org |
| <i>Communications</i> | | |
| User Guide development for website/portal (SP L3) | User Support, User Information Services | Maytal Dahan Susan Lindsey |
| Media Communications Coordination | User Support | Travis Tate |
| Operations mailing lists participation <ul style="list-style-type: none"> - ops-sp-software@xsede.org (Ops SP SW) - ops-cb-software@xsede.org (Ops CB) | Operations ST&D | CB Coordinator |
| Training (SP L3) | User Support, Training | Sam Moore |
| <i>Final Checkout prior to production</i> | | |
| SP End User Testing (optional) | Ops, SP, and Users | CB Coordinator |
| Ticket routing testing (SP L3) | Operations, SysOps and SP | Mike Pingleton and SP representative |

E. Service Provider and Campus Bridging Exit Checklist

The following describes the XSEDE service providers (SPs) and campus bridging (CB) exit checklist to be used for coordinating the exit of an allocated SP or CB resource from XSEDE. This checklist is maintained by the XSEDE Operations Software Testing and Deployment (ST&D) group.

Note that the exit of an SP or CB resource starts with the SP/CB staff specifying the expected exit date of the resource in the XSEDE RDR system (called the “Decommission date” in RDR). The SP Coordinator will monitor this information periodically to check for upcoming resource exits. This information will be reviewed during the annual SP and CB coordination review conducted by the XSEDE SP Coordinator.

Communication to users, XSEDE staff, campus champions, and XSEDE NSF Program Officer are important aspects of any XSEDE SP or CB exit.

For any questions regarding this checklist please contact the ST&D manager, Troy Baer or the XSEDE Operations SP Coordinator, Victor Hazlewood. Contact Troy Baer at tbaer@utk.edu or Victor Hazlewood at victor@utk.edu.

| SP Level 1 and SP Level 2 Allocated Resource Exit Checklist | | |
|--|---|--|
| Integration Item | XSEDE Group | Coordinator |
| Start | | |
| SP Coordinator will periodically review SP resource end dates (exit date) in the XSEDE RDR system and coordinate with SP and XSEDE staff. This will be inspected at least at the annual SP checklist review (See Note 1) | Operations, ST&D | SP Coordinator |
| User and XSEDE Notifications | | |
| At 12 months prior to the exit date XSEDE will send communication through the XSEDE allocations notification news item to all XSEDE users regarding the exit date and effects on allocation requests; this is to inform the users of the exit date and inform them that the next round of allocation requests would have shortened periods for the resource (see Note 2) | SP management and staff, Allocations, User Services | SP Coordinator |
| SP will communicate to active PIs 6, 3, and 1 month prior to the exit date explaining disposition of the resource and instructions to user's concerning access to their data | SP mgmt and staff, Allocations, User Services | SP Coordinator |
| At 1 month prior to exit date XSEDE Operations will send an email to XSEDE staff, campus champions, and SP Forum Chair announcing the exit of a resource and any related information/instructions | ST&D | SP Coordinator |
| | | |
| Allocations | | |
| Coordinate with service provider for amount of resource to allocate to XRAC process, especially for the XRAC allocations meetings at 9, 6 and 3 months prior to the exit date | SP mgmt and staff, Allocations | SP, Ken Hackworth |
| Coordinate with the service provider for the removal of the resource from requests in XRAS (formerly POPS) | SP mgmt and staff, Allocations, A&AM, User Interfaces | SP, Ken Hackworth, Amy Schuele, Maytal Dahan |
| In coordination with the service provider and after the exit date, retire XSEDE staff allocations related to this resource | SP mgmt, Allocations, A&AM | SP, Ken Hackworth, Amy Schuele |
| Coordinate transfer of remaining balances of unexpired allocations on the decommissioned resource to other ongoing resources. (This transfer may be capped at the lesser of the unused balance and the pro rated period of the original allocation on the exiting resource.) | SP mgmt, Allocations | SP, Ken Hackworth |
| | | |
| Operations | | |
| Discuss the disposition of participation in | SP mgmt, XSEDEnet | Joe Lappa |

| | | |
|---|-----------------------------------|--------------------------------|
| XSEDEnet after the exit date | | |
| Set date to retire ticket system category for the exiting SP. Provide final ticket report for the quarter and the annual period | SP mgmt, SysOps | Mike Pingleton |
| Set date to end AMIE requests to/from SP | Operations, AA&M | Amy Schuele |
| Retire SP in XSEDE Information Services <ul style="list-style-type: none"> - Make sure RDR retirement date is set - Shut down any globus-wsrf that serves job and load information - Before shutting down the globus-mds-info in the core kit (etc/registeredkits.conf) comment out all kits that will no longer be accessible. Do not comment out the core kit - For the core kit set reg/kit.conf "SupportGoal = retired" - Restart the globus-mds-info to pick up the new changes - After the changes have propagated to info services (see Note 3) shutdown globus-mds-info | SP mgmt, ST&D, SD&I | SP Coordinator |
| Remove resource from "staff" resource list in XDCDB | A&AM | Amy Schuele |
| Coordinate retirement of INCA and Nagios monitoring | SP staff, SysOps, INCA | Stephen McNally, Shava Smallen |
| Remove SP staff as appropriate from Operations mailing list participation <ul style="list-style-type: none"> - ops-accting@xsede.org (accounting) - ops-sp-software@xsede.org (SP SW and services) - incident-discuss@xsede.org | List admin | SP Coordinator, list admin |
| | | |
| Portal and Website | | |
| Remove resource information from Portal and Website (resource listing, user guide, job/load info, etc.) | User Support, User Info Resources | Maytal Dahan |
| | | |
| Other Coordination | | |

| | | |
|--|--------------------------------------|--|
| Final SPs feedback to XSEDE <ul style="list-style-type: none"> • SP entry, maintenance, exit processes • Feedback on Software and Services | ST&D/Engineering ST&D/Engineering | Janet Brown, SP Coordinator Janet Brown, SP Coordinator |
| | | |

Notes:

1. To establish an understanding of a resource end date is determined from an XSEDE point of view review the following:
 - For "Track 2"-style resources (Level 1 SPs), this can be tied to the known award end date in the NSF awards database
 - For systems supported by other funds the end date should be set by the SP and reviewed at the annual checklist review
 - For Level 2/3 resources that are not allocated it is important for XSEDE to have accurate information on the XSEDE website, portal, RDR and other systems. Participation in XSEDE will be confirmed at least annually and determined if the service will exit within the next 12 months.
2. Communications to users should outline their options for allocations on the resource (e.g., will there be 9-, 6-, and/or 3-month allocation made as the resource nears end of availability). Communications to user should relate options for alternate resources to target for their work. No allocations made on the resource should have an end date past the known end date of the system within XSEDE; availability will need to be pro-rated on time left in the last few allocation rounds if made available. Communications to users may advise them that they should request as much time as they think they need because amounts that were cut from requested allocations may be reinstated if the end date of the requested resource is extended.
3. Check information services at <http://info.teragrid.org/web-apps/html/kit-reg-v1/> and look for the specific resource.